UNIFY
atos collaboration solutions

OpenScape UC Application V10
OpenScape Add-ins

User Guide

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Contents

1 About this Document

In this section we provide information about the document on hand.

1.1 History of Changes

Date	Changes	Reason
24/05/2023	Initialization of document	UCBE-32632
25/10/2023	Added: • Configuration of OpenScape Add-ins Deployment Parameters • Setup of OpenScape Add-ins custom plugin controller	UCBE-33641
22/02/2024	Updated: • Setup of OpenScape Add-ins custom plugin controller	UCBE-34171

1.2 Markups used

In this document we use the following markups to highlight specific passages.

Element	Markup
GUI elements	Select **Save** to …
Sequence of menu items	**Users& Resources** > **Resources**
Command line output	`C:> unknown command`
System input	Enter `true` in the ... field.
Directory and file names	`/var/config.xml`
File contents	`conname=%CONNECTION_NAME%`
Names of keyboard keys	Push `Esc` to …
Specifications with varying content	<user name>

1.3 Notes

Types of notes

Critical notes and additional information are indicated in this manual in the following manner:

> **NOTICE:** Denotes information worth knowing or useful tips.

> **IMPORTANT:** Denotes information of **high priority**. Please definitely read and heed such notes to avoid malfunctions, loss of data or damage to devices.

1.4 Continuative Documentation

You can find further information about OpenScape UC Desktop App in the following documentation:

- OpenScape UC Application V10, UC Desktop App, User Guide

2 Introduction

This guide describes how to download, install and make use of the Openscape Add-ins integration.

2.1 OpenScape Add-ins

OpenScape Add-ins is an integration between OpenScape UC and Microsoft Outlook. It extends Microsoft Outlook with features provided by OpenScape UC.

It allows you to access OpenScape UC contacts, call history, conferences, surveys, voicemail and chats directly from Microsoft Outlook.

With OpenScape Add-ins, you can easily:

- Call an email originator by email, number or name
- Start a conference with people from an email
- Start a chat
- Activate Tell-me-when
- Access OpenScape UC features, in particular:
  – Contacts
  – Call history
  – Conference
  – Surveys
  – Voicemail
  – Chat
- Set your OpenScape UC presence state
- Select a preferred device to be used for incoming and outgoing calls
- Access the settings of an outgoing device

2.2 Prerequisites

- You have a Microsoft Outlook account.
- You have an OpenScape UC account.
- On a desktop computer, for the best possible user experience when working with OpenScape Add-ins, it is mandatory that OpenScape Desktop App is installed.
- You have downloaded and installed the OpenScape Add-ins integration.

2.3 Supported platforms

You can use OpenScape Add-ins on an Windows computer.

3 How to download and install OpenScape Add-ins

To integrate OpenScape UC with Microsoft Outlook, you need to download and install OpenScape Add-ins.

This section describes how to set up OpenScape Add-ins for individual use.

Follow the steps below to download and install the integration on your computer:

Prerequisites

- Your system administrator has enabled the OpenScape Add-ins download option on your system.

  For more information, see chapter "*How to enable the OpenScape Add-ins download option*" in *OpenScape UC Application V10, Configuration and Administration, Administrator Documentation*.

Step by Step

1) In your UC client, click on your user name.
   A menu with the available options is displayed.
2) Click **Settings**.
3) Under the **General** tab, locate the **OpenScape Add-ins** area and click **Download OpenScape Add-ins**.
   A `zip` file containing the OpenScape UC for Microsoft Outlook integration files is downloaded to your computer.
4) Locate the `zip` file (usually in the Download folder) and extract it.

   The following file is extracted:

   - `OpenScapeAddIns.exe`
5) Double-click on the `OpenScapeAddIns.exe` file to start the installation process.
   The installation wizard opens.
6) Follow the instructions on the installation wizard to install OpenScape Add-ins.

To successfully complete the installation process, you might be prompted to:

- Stop any running instances of Microsoft Outlook and OpenScape Desktop App.
- Restart the Microsoft Outlook client.
- Restart your computer.

4 How to enable or disable OpenScape Add-ins

Follow the steps below to enable or disable the OpenScape Add-ins integration from Microsoft Outlook.

Prerequisites

• You have installed OpenScape Add-ins.

Step by Step

1) Open Microsoft Outlook and navigate to the **File** tab.
2) Click **Options** on the left navigation bar.
   A pop-up window opens with Outlook options that you can customize.
3) Click **Add-ins** on the left navigation bar.
4) Select the **COM Add-ins** option from the **Manage** drop-down list, then click **Go**.
   A list of available add-ins is displayed.
5) Locate **OpenScape for MS Office** in the list and do one of the following actions:

   • Uncheck the checkbox next to it to disable the add-in

     or
   • Check the checkbox next to it to enable the add-in.
6) Click **OK**.

5 How to uninstall OpenScape Add-ins

You can uninstall the OpenScape Add-ins integration in one of the following ways from Windows **Apps & features** area or via mass installation.

To uninstall the integration from Windows **Apps & features**, follow the steps below:

1) Open Windows search, type `Apps & features` and press `Enter`.

The **Apps & features** dialog opens and you can view the list of all apps installed on your computer.

2) Search for or locate **OpenScape Add-ins** in the list.

3) Click on it and select **Uninstall**.

4) Click **Uninstall** again to confirm the action.

5) Follow the instructions on the wizard to uninstall OpenScape Add-ins.

To uninstall the integration via mass installation, refer to chapter

6 How to perform the mass installation of OpenScape Add-ins

This section describes how to perform a mass installation of OpenScape Add-ins and make the integration available for multiple users or machines.

NOTICE: Mass installations can be only triggered by a system administrator.

6.1 How to setup installer command line parameters

The following command line parameters can be specified for the mass installation of OpenScape Add-ins:

- **/passive**

  no user interaction (progress bar only)
- **/q, /quiet, /s, /silent**

  Use to run the installer in silent mode. That means no user feedback
- **/norestart**

  When running in unattended or silent mode, if a reboot is required, it will be done automatically, unless this option is used.
- **/layout "path"**

  Only download remote payloads (prerequisites) from the internet and save them to path.
- **/log "path"**

  Change the default bundle's log file.
- **/uninstall**

  uninstall
- **/repair**

  repair
- **InstallFolder="c:\Add-ins"**

  You can use this parameter to customize the OpenScape Add-ins installation folder. This parameter is case sensitive.

  By default, this parameter is not used. When it is not used, the OpenScape Add-ins integration is installed in one of the following folders: `Program Files (x86)` (for 64-bit systems) or `Program Files` (for 32-bit systems).

6.1.1 Configuration of OpenScape Add-ins Deployment Parameters

After successful installation of OpenScape Add-ins, the `deployment.xml` deployment file is created. You can modify this file and configure the parameters for a future mass installation.

> **NOTICE:** It is recommended to create a copy of the `deployment.xml` file and rename it according to the parameters you want to configure.

Once the parameters are configured according to your needs, you can run the installation command for OpenScape Add-ins. For example, you can run the following command, where parameters are configured via the `deployment.xml` file:

```
OpenScapeAddIns.exe /s DeploymentFile="c:\addins
\my_deployment.xml"
```

If your deployment file has a different file name, you must adapt the `DeploymentFile` parameters accordingly.

Once the OpenScape Add-ins installation is completed, the `deployment.xml` file is copied to the following path:

```
%programdata%\Unify\Fusion\deployment.xml
```

After installation, if you have administrator rights, you can modify the OpenScape Add-ins installation at any time. For this, you need to do the following steps:

1) First, modify the `deployment.xml` file according to your needs.
2) Then run the `deployment_tool.exe` executable file, located in the `%programdata%\Unify\Fusion` path.
3) Restart the OpenScape UC Desktop Application to apply the changes.

You can find below the description of several deployment parameters:

- **ODC_ContactCard_Enabled**

  This parameter specifies whether the Outlook Contact Card Plugin will be installed.

- **Outlook_Plugin_Enabled**

  This parameter specifies whether the Outlook Plugin will be installed on the Microsoft Outlook Ribbon.

- **Outlook_CalendarPlugin_Enabled**

  This parameter specifies whether the OpenScape Calendar Extension for Microsoft Outlook will be installed.

- **Outlook_Plugin_ChatButton_Enabled**

  This parameter can be set to **True** (default) or **False**.

  If set to **True**, the chat button appears on the **Microsoft Outlook Ribbon** and in the **Connect to** area of the Outlook Plugin.

  If set to **False**, the chat button doesn't appear in any of the locations mentioned above.

  If this parameter is not configured, it is set to **True** by default.

6.1.2 Setup of OpenScape Add-ins custom plugin controller

You can setup the OpenScape Add-ins integration to include custom plugin controller components for Microsoft Outlook.

⚠️ **WARNING:** You can only install the custom plugin controller if:

- The OpenScape UC Desktop Application is closed

  or

- The OpenScape UC Desktop Application has not been restarted after installing OpenScape Add-ins.

To setup the custom plugin controller, you need to modify the `_._._.userscript` file, located in the `C:\ProgramData\Unify \OpenScape` path.

For example, the `_._._.userscript` can include the following content:

```
<configuration>
  <pc._._>
    <siemens.opticlient>
      <startup>
        <lastlocation>OPENSCAPE</lastlocation>
        <linmode>None</linmode>
        <locationselection>True</locationselection>
        <languageselection>False</languageselection>
        <usewindowslogin>True</usewindowslogin>
        <listusers>True</listusers>
            <useoslanguage>True</useoslanguage>

            <adminmode>Full</adminmode>
      </startup>
    </siemens.opticlient>
  </pc._._>  <_.user._>
    <siemens.opticlient>
      <startup>
        <password>#</password>
        <colorscheme>DarkGray</colorscheme>
      </startup>
    </siemens.opticlient>
  </_.user._>
</configuration>
```

The content below is required to make default changes to the Microsoft Outlook Plugin Integration Controller components:

```
<unify.opticlient.pluginintegration.pluginintegration>
        <usepresencesynchronization>True</
usepresencesynchronization>
        <usedefaultconferencingoptions>False</
usedefaultconferencingoptions>
        <audioconferencerecordname>False</
audioconferencerecordname>
        <audioconferencemoderatedconference>False</
audioconferencemoderatedconference
        <audioconferencedialoutdefault>False</
audioconferencedialoutdefault>
        <standardlanguage>en</standardlanguage>
        <inv_ca>False</inv_ca>
        <inv_zh>False</inv_zh>
```

```
        <inv_cs>False</inv_cs>
        <inv_nl>False</inv_nl>
        <inv_en>True</inv_en>
        <inv_fr>False</inv_fr>
        <inv_de>False</inv_de>
        <inv_it>False</inv_it>
        <inv_pt_br>False</inv_pt_br>
        <inv_pt>False</inv_pt>
        <inv_ru>False</inv_ru>
        <inv_es>False</inv_es>
</unify.opticlient.pluginintegration.pluginintegration>
```

It is possible to change the controller components, as described in the table below:

IMPORTANT:

To change the default values, you must edit the `_._._.userscript` file before the first login to the OpenScape UC Desktop Application.

If the OpenScape UC Desktop Application has been started at least once since its installation, changes of the default values are only possible after completing the following steps:

1) Uninstall OpenScape Add-ins and OpenScape UC Desktop Application.
2) Navigate to `C:\Users\YourUser\AppData\Roaming` and delete the entire Unify content and directory.
3) Reinstall OpenScape UC Desktop Application and OpenScape Add-ins.

   Once the installations are completed, do not start any of the applications.
4) Edit the default values in the `_._._.userscript` file according to your need.

   For example, change the default value for user presence from
   ```
   <userpresencesynchronization>True</
   userpresencesynchronization>
   ```
   to
   ```
   <userpresencesynchronization>False</
   userpresencesynchronization>
   ```
5) Start the OpenScape UC Desktop Application and OpenScape Add-ins applications for the first time.

Feature	Default value
Change user presence to "In a meeting" Compare: `<userpresencesynchronization>True</userpresencesynchronization>`	True

Feature	Default value

Create conference with default settings
 	
Compare:
`<usedefaultconferencingoptions>False</`
`usedefaultconferencingoptions>`
	False

Request user name
 	
Compare:
`<audioconferencerecordname>False</`
`audioconferencerecordname>`
	False

Moderated conference
 	
Compare:
`<audioconferencemoderatedconference>False</`
`audioconferencemoderatedconference>`
	False

Dial out to participants
 	
Compare:
`<audioconferencedialoutdefault>False</`
`audioconferencedialoutdefault>`
	False

Standard Language
 	
Compare:
`<standardlanguage>en</standardlanguage>`
 	
The following locale values are possible:
 	
`ca to Catalan(Catalan)`
`pt_br to Portuguese(Brazil)`
`de to German(Germany)`
`ru to Russian(Russia)`
`pt to Portuguese(Portugal)`
`it to Italian(Italy)`
`zh to Chinese Simplified`
`cs to Czech(Czech Republic)`
`fr to French(France)`
`es to Spanish(Spain)`
`en to English(United States)`
	English

Feature	Default value

Invitation text - Other Language
 	
Compare:
 	
`<inv_ca>False</inv_ca>      Catalan(Catalan)`
`<inv_pt_br>False</inv_pt_br>`
` Portuguese(Brazil)`
`<inv_de>False</inv_de>      German(Germany)`
`<inv_nl>False</inv_nl>      Dutch (Belgium)`
`<inv_ru>False</inv_ru>      Russian(Russia)`
`<inv_pt>False</inv_pt>      Portuguese(Portugal)`
`<inv_it>False</inv_it>      Italian(Italy)`
`<inv_zh>False</inv_zh>      Chinese Simplified`
`<inv_cs>False</inv_cs>      Czech(Czech Republic)`
`<inv_fr>False</inv_fr>      French(France)`
`<inv_es>False</inv_es>      Spanish(Spain)`
`<inv_en>True</inv_en>       English(United States)`
	English

After making the desired changes to the components, you need to add the content you have modified to the `_._._.userscript` file. In the following example, you can view the place where the changed content (highlighted with bold) should be added:

```
<configuration>
  <pc._._>
    <siemens.opticlient>
      <startup>
        <lastlocation>OPENSCAPE</lastlocation>
        <linmode>None</linmode>
        <locationselection>True</locationselection>
        <languageselection>False</languageselection>
        <usewindowslogin>True</usewindowslogin>
        <listusers>True</listusers>
            <useoslanguage>True</useoslanguage>

            <adminmode>Full</adminmode>
      </startup>
    </siemens.opticlient>
  </pc._._>
  <_.user._>
    <siemens.opticlient>
      <startup>
        <password>#</password>
        <colorscheme>DarkGray</colorscheme>
      </startup>
    </siemens.opticlient>
    <unify.opticlient.pluginintegration.pluginintegration>
       <usepresencesynchronization>True</
usepresencesynchronization>
        <usedefaultconferencingoptions>False</
usedefaultconferencingoptions>
```

```
                    <audioconferencerecordname>False</
        audioconferencerecordname>
                    <audioconferencemoderatedconference>False</
        audioconferencemoderatedconference
                    <audioconferencedialoutdefault>False</
        audioconferencedialoutdefault>
                    <standardlanguage>en</standardlanguage>
                    <inv_ca>False</inv_ca>
                    <inv_zh>False</inv_zh>
                    <inv_cs>False</inv_cs>
                    <inv_nl>False</inv_nl>
                    <inv_en>True</inv_en>
                    <inv_fr>False</inv_fr>
                    <inv_de>False</inv_de>
                    <inv_it>False</inv_it>
                    <inv_pt_br>False</inv_pt_br>
                    <inv_pt>False</inv_pt>
                    <inv_ru>False</inv_ru>
                    <inv_es>False</inv_es>
              </unify.opticlient.pluginintegration.pluginintegration>
          </_.user._>
      </configuration>
```

6.2 How to perform a repair of OpenScape Add-ins

You can repair the installation of OpenScape Add-ins via **Windows Control Panel** (in the **Programs and Features** area) or via the command line, using the following command:

`OpenScapeAddIns.exe /repair`

6.3 How to find errors during the OpenScape Add-ins installation

Several log files are created during the OpenScape Add-ins installation process. You can use the log files for troubleshooting purposes.

Step by Step

During the installation, any data you have specified in the setup command is written in the log file.

Example of a setup command:
`OpenScapeAddIns.exe /norestart /log "%TEMP% \install_odc.log" /q`

NOTICE: You can use the echo command to get the value of a Windows environment variable.

For example, the output of the `echo %TEMP%` command can be:
`C:\Users\<user name>\AppData\Local\Temp`

or
`C:\Users\shi\AppData\Local\Temp`

You can use the `set` command to get the values of all Windows environment variables.

6.4 How to uninstall OpenScape Add-ins via Mass Installation

You can uninstall OpenScape Add-ins via the command line, using the following command:

```
OpenScapeAddIns.exe /uninstall
```

7 How to access OpenScape Add-ins in Microsoft Outlook

The OpenScape Add-ins integration allows you to access OpenScape UC features directly from Microsoft Outlook via:

- Microsoft Outlook Ribbon
- Microsoft Outlook Reading Pane
- Microsoft Outlook Context Menu
- Microsoft Outlook Contact Card

7.1 OpenScape Add-ins tab in Microsoft Outlook Ribbon

Once the OpenScape Add-ins integration is installed, a new button ( ) is added to the Microsoft Outlook Ribbon.

> **NOTICE:** You can display the Microsoft Outlook Ribbon via the **Home** tab.

You can click this button to view a list of features that you can access directly from Microsoft Office.

The following features are available:

- **Contacts**

  This tab displays your list of UC contacts. You can filter the list to display specific groups of contacts.
- **Call History**

  This tab displays a list of all your incoming and outgoing calls.
- **Conferences**

  This tab displays your list of conferences with additional details such as the Bridge number, PIN and date/time of scheduled conferences. From here you can access more details for each conference or initiate conference calls.
- **Surveys**

  This tab displays a list of surveys you have created (if any). From here you can create a new survey, edit an existing one, see, clear or print responses and send survey invitations to other users.
- **Voicemail**

  This tab displays a list of your voicemails. You can listen to or download your voicemail messages and see additional details such as the message duration and the sender.
- **Chat**

  This tab displays a list of chats you are part of. From here, you can access additional details such as chat's name, type and creation date and time. You can also open a chat to see existing messages of send new ones.

When you select a feature in Microsoft Outlook, your OpenScape UC client cross launches and you are navigated to the corresponding tab.

The Microsoft Outlook Ribbon also allows you set your OpenScape UC presence status directly from Microsoft Outlook.

7.2 OpenScape Add-ins in Microsoft Outlook Reading Pane

Once the OpenScape Add-ins integration is installed, the following new options are available in the Microsoft Outlook Reading Pane:

- Initiate an **OpenScape call** with the email originator.
- Start a **Chat** with the email originator.
- Activate **Tell-me-when**.
- Start a **Conference** with the email originator or the distribution list.

You can display, customize or change the location of the Reading Pane in Microsoft Outlook, by navigating to **View** > **Reading Pane**.

7.3 OpenScape Add-ins in Microsoft Outlook Context Menu

Once the OpenScape Add-ins integration is installed, new options are available in the Microsoft Outlook Context Menu:

- Initiate an **OpenScape call** with the email originator.
- Start a **Chat** with the email originator.
- Activate **Tell-me-when**.
- Start a **Conference** with the email originator or the distribution list.

7.4 Microsoft Outlook Contact Card

Once the OpenScape Add-ins integration is installed, the following options become available in Microsoft Outlook, via email originator's Contact Card:

- Start an audio call
- Start a chat

You can display someone's contact card by clicking on a person's picture (or name with a presence icon), then clicking **Contact >**.

7.5 Microsoft Outlook message preview

Once the OpenScape Add-ins integration is installed, the following options become available when you read an email in message preview:

- Call originator's business number
- Start a conference with people for the email
- Start a chat
- Activate Tell-me-when

You can display an email in message preview by clicking on in the Microsoft Outlook Reading Pane. The OpenScape UC options are displayed in the upper part of message preview.

8 How to use OpenScape Add-ins in Microsoft Outlook

8.1 How to initiate a call via OpenScape Add-ins

You can initiate OpenScape UC calls from Microsoft Outlook in one of the following ways:

- Click ⌀ in Microsoft Outlook Reading Pane or in email preview to call the email originator/s.

- Click 👥 **Connect to** in Microsoft Outlook Ribbon, then search for an OpenScape UC contact or enter a phone number to call.

- Click 📞 in a contact card to call the email originator's bussiness number.

When making an OpenScape UC call from Microsoft Outlook, it will cross launch your OpenScape UC client and use it to initiate the call. The call is initiated from OpenScape UC Desktop App (default), softphone or desk phone, depending on what you have selected as calling device.

All calls initiated from Microsoft Outlook are displayed in OpenScape UC as any other call.

8.2 How to select incoming and outgoing devices in OpenScape Add-ins

You can select the preferred device to be used for incoming and outgoing calls as well as access additional device settings directly from Microsoft Outlook.

You can do this from the OpenScape Add-ins area in Microsoft Outlook Ribbon.

Procedure

- Follow the steps below to select an incoming device:

  a) Click 📶 **WebRTC** in Microsoft Outlook Ribbon.
  b) Under **Incoming calls**, select one of the available options:

    – Work phone
    – Softphone
    – WebRTC (default)

- Follow the steps below to select an outgoing device:

  a) Click 📶 **WebRTC** in Microsoft Outlook Ribbon.
  b) Under **Outgoing calls**, select one of the available options:

    – Same as incoming (default)
    – Work phone
    – Softphone
    – WebRTC

- Follow the steps below to access additional device settings:

  a) Click 📶 **WebRTC** in Microsoft Outlook Ribbon.
  b) Click **Device settings**.

    Your OpenScape UC client cross-launches and you are navigated to the **Devices** tab.
  c) Adjust the settings according to your needs and click **Save**.

8.3 How to set your presence status in OpenScape Add-ins

Your presence status lets people know if you are available for communication or not.

You can manually set your presence status via the OpenScape Add-ins area in Microsoft Outlook Ribbon. The following presence or availability statuses are available:

- ⊘ Available
- ◔ Away
- ⊖ Do not disturb
- ● Be right back
- ● Busy
- ● In meeting

Your presence status in Microsoft Outlook is synchronized with your presence status in OpenScape UC. The presence synchronization is bidirectional, meaning that changing your presence status in one app will be automatically reflected in the other app.
Your availability in OpenScape UC is affected by external Microsoft Outlook events. For example, your OpenScape UC presence status becomes **In meeting** when you have a meeting appointment in your Microsoft Outlook calendar.

8.4 How to search for a contact in OpenScape Add-ins

You can search for a UC contact or dial a contact's phone number via the OpenScape Add-ins integration.

Step by Step

1) Open the Microsoft Outlook app and navigate to the **Home** tab.

2) Click 🖧 **Connect to** in the Microsoft Outlook Ribbon.
   An input field is displayed.

3) Type the name of a UC contact or dial their phone number.
   A list of UC contacts that match your search is displayed (if any).

4) Hover your mouse over the desired contact and choose one of the available options:

   - Click ⌽ to call the contact's phone number.

   - Click ☰ to view a list of the communication options available for the contact selected .

   - Click ⊕ to add the contact selected to the action bar.

     From here, you can do one of the following actions:

     – Click ⌽ to call the contact.

     – Click ☰ to create a conference, add to chat or send an email to the contact.

8.5 How to access conferences from OpenScape Add-ins

You can access the list of UC conferences you are part of via the OpenScape Add-ins integration.

Step by Step

1) Open the Microsoft Outlook app and navigate to the **Home** tab.

2) Click ⬛ˇ in the Microsoft Outlook Ribbon and select **Conferences**. Your OpenScape UC client cross-launches and you are navigated to the **Conferences** tab.

A list of conferences that you are a part of is displayed.

8.6 How to start a conference in OpenScape Add-ins

You can start a UC conference directly from Microsoft Outlook in one of the following ways:

- Click ⬛ˇ in Microsoft Outlook Ribbon and select **Conference**.

  This will cross launch your OpenScape UC client and navigate you to the **Conferences** tab. From here, you can create a new conference or start an existing one.

- Right-click an email in the Microsoft Outlook Reading Pane, then select Ⓐ.

  A pop-up window is displayed and you can set the conference title or add more participants.

  Click **Start** to start the conference.

- While an email is in message preview, click Ⓐ at the top part.

  A pop-up window is displayed and you can set the conference title or add more participants.

  Click **Start** to start the conference.

Conferences scheduled using the OpenScape Add-ins integration are also displayed in the Microsoft Outlook calendar.

8.7 How to access chats via OpenScape Add-ins

You can access your UC chats via the OpenScape Add-ins integration.

Step by Step

1) Open the Microsoft Outlook app and navigate to the **Home** tab.

2) Click ⬛ˇ in the Microsoft Outlook Ribbon and select **Chat**. Your OpenScape UC client cross-launches and you are navigated to the **Chats** tab.

A list of chat conversations you are part of is displayed.

8.8 How to start a chat in OpenScape Add-ins

You can start a chat with directly from Microsoft Outlook in one of the following ways:

- Right-click an email in the Microsoft Outlook Reading Pane, then select **Chat**.
- While an email is in message preview, click at the top part.

8.9 How to access call history from OpenScape Add-ins

You can access your UC call history via the OpenScape Add-ins integration.

Step by Step

1) Open the Microsoft Outlook app and navigate to the **Home** tab.

2) Click in the Microsoft Outlook Ribbon and select **Call history**.
Your OpenScape UC client cross-launches and you are navigated to the **Call history** tab.

A list of incoming and outgoing calls to your OpenScape UC client is displayed.

8.10 How to access surveys via OpenScape Add-ins

You can access your UC surveys via the OpenScape Add-ins integration.

Step by Step

1) Open the Microsoft Outlook app and navigate to the **Home** tab.

2) Click in the Microsoft Outlook Ribbon and select **Surveys**.
Your OpenScape UC client cross-launches and you are navigated to the **Surveys** tab.

A list of existing surveys (is any) is displayed.

8.11 How to access your voicemail via OpenScape Add-ins

You can access your voicemail messages via the OpenScape Add-ins integration.

Step by Step

1) Open the Microsoft Outlook app and navigate to the **Home** tab.

2) Click in the Microsoft Outlook Ribbon and select **Voicemail**.
Your OpenScape UC client cross-launches and you are navigated to the **Voicemail** tab.

A list of voicemail messages (if any) is displayed.

8.12 How to activate Tell-me-when in OpenScape Add-ins

You can activate Tell-me-when via the OpenScape Add-ins integration to get notified when somebody becomes available.

You can activate this option in one of the following ways:

- Right-click an email in the Microsoft Outlook Reading Pane, then select **Activate Tell-me-when**.

- While an email is in message preview, click 🕐 at the top part.

8.13 How to create a UC conference

You can create a UC conference directly from Microsoft Outlook using the OpenScape Add-ins integration.

Step by Step

1) Open Microsoft Outlook and navigate to the **Home** tab.

2) Click ^ next to **New Items** on the Microsoft Outlook Ribbon, then select **Meeting**.

   The **Untitled - Meeting** dialog opens.

3) Enter a title for the conference in the **Title** field.

   The conference title will be displayed in **Call Control** and **Call Journal**.

4) Add the desired conference participants in the **Required** and/or **Optional** fields.

5) Select the desired start time and end time for the conference.

   Alternatively, you can schedule a recurring meeting by clicking **Make Recurring** and then selecting the appointment time, recurring pattern and range of recurrence.

   > **NOTICE:** OpenScape Add-ins does not allow scheduling all day events.

6) Click ⚛ **Add Conference** on the Microsoft Outlook Ribbon.

   The **OpenScape conference** dialog opens.

   Depending on your OpenScape Add-ins configuration settings, specific options may be preconfigured. For more information about the OpenScape Add-ins settings, see How to configure OpenScape Add-ins settings on page 28.

7) Configure the conference settings:

a) In the **Title** field, you can change the conference title that you have specified when creating the meeting request or that was automatically generated by the system.

b) In the **Participants** section, you can change the following parameters:

- The phone number to be used for calling the conference participants.
- The role of participants (invitee or moderator), in case of a moderated conference.
- The way participants will join the conference (call in or call out).

> **NOTICE:** You can change the way participants join the conference even if you have enabled the **Dial out to participants** option in the OpenScape Add-ins settings.

c) In the **Invitation text** section, you can select the desired language/s to be used for the invitation text.

d) In the **Audio conference** section, you can select the following options:

- Enable the **Moderated conference** option if you want to schedule a moderated conference.

> **NOTICE:**
>
> For moderators, more options to control the conference are available compared to other conference invitees.
>
> Moderated conferences require the presence of a moderator. If a moderator is not in the conference, other participants that have dialed in will hear the on-hold music until a moderator joins the conference. In case of dial-out conferences, a moderator must start the conference.

If you want to schedule an open conferences, the **Moderated conference** option needs to be disabled.

> **NOTICE:** Open conferences start when the first participant joins the conferences.
>
> All participants have the same options to control the conference.

- Enable the **Record name** option if you want to record the names of the conference participants.

> **NOTICE:** If this option is enabled, conference participants must specify their name before joining the conference.

8) Click **Ok**.

The conference is created and you can view the following information in the subject area of the meeting dialog:

- The conference title
- The creator of the conference
- The date and time when the conference is scheduled
- A link to join the conference
- The bridge number and pin of the conference
- Other bridge numbers

> **NOTICE:** The system sends the invitation in text-only format. Any text formatting applied to the invitation text (font, size etc.) will be ignored when the meeting request is sent.

9) Click **Send** to send the invitation to the conference participants.

A meeting appointment is added to your Microsoft Outlook calendar.

8.13.1 How to modify a UC conference

You can modify a UC conference that you have previously created directly from Microsoft Outlook.

> **NOTICE:** You can only modify a UC conference before its start time. After the conference start time, you can only delete a UC conference.

Step by Step

1) Open Microsoft Outlook click 🖾 on the left navigation bar to open the Microsoft Outlook calendar.

2) Locate the conference you want to delete and double click on it.

3) Click 🖌 **Modify OpenScape Conference** on the Microsoft Outlook Ribbon. The **OpenScape conference** dialog opens.

4) Modify the desired conference parameters, then click **Ok**.

5) Click **Send** to send an updated conference invitation.

The conference is updated according to the changes you have made.

8.13.2 How to delete a UC conference

You can delete a UC conference that you have previously created directly from Microsoft Outlook.

Step by Step

1) Open Microsoft Outlook click on the left navigation bar to open the Microsoft Outlook calendar.

2) Locate the conference you want to delete and double click on it.

3) Click **Delete Conference** on the Microsoft Outlook Ribbon.

4) Click **Ok** to confirm the delete action.

The conference is removed from your Microsoft Outlook calendar.

8.13.3 How to start a UC conference

You can start a UC conference directly from Microsoft Outlook.

Step by Step

1) Open Microsoft Outlook and click on the left navigation bar to open the Microsoft Outlook calendar.

2) Locate the conference you want to start and double click on it.

3) Click **Start OpenScape Conference** on the Microsoft Outlook Ribbon.

Your OpenScape client opens and the conference is started.

9 How to access OpenScape Add-ins from system tray

OpenScape Add-ins provides system tray functionality that allows you to easily access specific features without the need to open the Microsoft Outlook client.

To access OpenScape Add-ins from the system tray, click ^ on the right side of the task bar, then right-click on the OpenScape Add-ins icon (). You can select one of the options available:

- **Errors and Warnings**, to displays the current error report.
- **Settings**, to view or edit configuration settings.
- **Info**, to view more information about the OpenScape Add-ins integration.
- **Exit**, to stop OpenScape Add-ins from running.

## 9.1 How to configure OpenScape Add-ins settings

You can access the OpenScape Add-ins settings from the Windows System Tray. In this area, you can edit your presence and conference settings and select the desired language/s in which conference invitations are sent out to participants.

Step by Step

1) Click ^ on the right side of the task bar to open the system tray.

2) Right-click on the OpenScape Add-ins icon, then select **Settings**.

The **Settings** window opens and you can view the configuration options available.
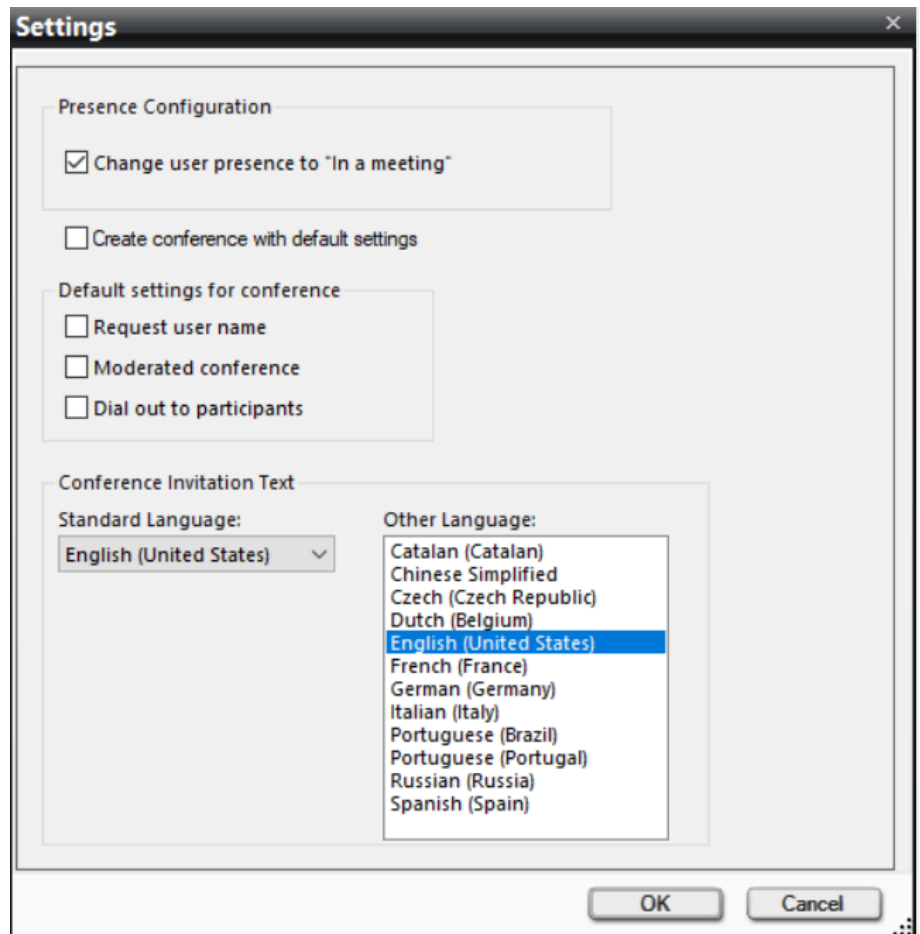
You can edit the configuration settings according to your needs:

- Enable the **Change user presence to "In a meeting"** option to allow changing your presence status to **In a meeting** automatically, for the conference duration.
- Enable the **Create conference with default settings** option to skip opening the settings dialog for individual conference configuration, when you click the OpenScape Add conference button.
- Enable the **Request username** option to request each conference participant to specify their name before joining a conference. If you enable this option, participants are only allowed to join conferences after entering their name.
- Enable the **Moderated conference** option if you want to configure a moderated conference. If you enable this option, only a moderator can start and control moderated conferences.
- Enable the **Dial out to participants** option to allow the system to call all conference participants automatically when a conference is started.
- Select the language to be used for the conference invitation text from the **Standard Language** drop-down menu. By default, the language selected during your Microsoft Outlook client installation is used. You can select additional languages for the conference invitation text by clicking the desired language/s in the **Other Language** box.

How to access OpenScape Add-ins from system tray

3) Click **Ok** to save the configuration changes.

10 How to update OpenScape Add-ins

When a new version of the OpenScape Add-ins integration is available, a banner is displayed in the OpenScape Desktop App, prompting you to install the latest version.

Prerequisites

- You have previously installed the OpenScape Add-ins integration.

Step by Step

1) In your UC client, click on your user name, then select **Settings** > **General**.

2) Locate the **OpenScape Add-ins** area and click **Download OpenScape Add-ins**.
   A `zip` file containing the latest version of the integration is downloaded to your computer.

3) Locate the `zip` file (usually in the Download folder) and extract it.

   The following file is extracted:

   - `OpenScapeAddIns.exe`

4) Double-click on the `OpenScapeAddIns.exe` file to install the latest version of the integration.
   The installation wizard opens.

5) Follow the instructions on the installation wizard.

6) Click **Ok** to save the configuration changes.

The latest version of OpenScape Add-ins is installed on your computer.

To successfully complete the update process, you might be prompted to:

- Stop any running instances of OpenScape UC Connector.
- Restart the Microsoft Outlook client.
- Restart the UC Desktop App client.
- Restart your computer.